Tee Obi

FREE FOR LINE MANAGERS

# The Manager's Copilot Kit

15 ready-made Microsoft Copilot prompts for the people side of managing, built on UK employment law and good practice.

- 15 prompts
- Teams, Outlook, Word and Copilot Chat
- UK law and the Acas Code
- Tee's check on every one

By **Tee Obi FCMI** · 15+ years in the people profession · CPD Approved Provider

## Five rules before you start

1. **Use your work Copilot**
   Sign in with your work account. In Copilot Chat, look for the shield or "Protected" label, which shows your organisation's data protection is on. Never use a personal AI account for work matters.
2. **Follow your AI policy**
   If your organisation has rules about AI, they come first. If you're not sure what's allowed, ask HR or IT before you start.
3. **Leave out what Copilot doesn't need**
   Use roles, not names, where you can. Leave out health details, diagnoses and anything about protected characteristics unless your organisation allows it and it's genuinely needed.
4. **Copilot drafts, you decide**
   Read every word. Check it against your own policies, and make sure it sounds like you. You're responsible for anything you send or say.
5. **Formal means HR first**
   For disciplinaries, grievances, dismissal, redundancy or anything that might end up formal, speak to HR or get advice before you act. Use Copilot to prepare, not to decide.

## Getting the best from Copilot

- Fill in everything in [square brackets] before you send the prompt.
- If your version lets you, point Copilot at your own policy, so it uses your rules. In Microsoft 365 Copilot you can type / and choose the file.
- Ask follow ups: "Make it warmer", "Shorter, please", "What have I missed?".
- Save the prompts you use most. Most Copilot apps let you save or star a prompt.

# Everyday management

## 01 Prepare a one to one

Copilot in Teams or Copilot Chat

THE PROMPT

I'm a line manager in the UK preparing for a 30 minute one to one with a [role] in my team. Since our last one to one: [two or three bullet points on what has happened, what went well, any concerns]. Suggest a simple agenda, five open questions that invite an honest answer about how they're doing and what would make work easier, and one way to end with a clear action for each of us. Keep the tone supportive and practical.

**Tee's check** Start with how they are, not the task list. Write down what you both agree and share it afterwards. If they raise something personal or health related, listen first and don't promise what you can't deliver.

## 02 Set clear expectations

Copilot in Word or Copilot Chat

THE PROMPT

Help me turn these vague expectations into three to five clear, measurable objectives for a [role] for the next [period]: [paste your notes]. For each one, give what good looks like, how we'll both know it's on track, and the support I'll provide. Use plain English, no jargon.

**Tee's check** Agree the objectives with the person, don't just hand them over. Check they're achievable in their contracted hours, and adjust for anyone with reasonable adjustments or flexible working.

## 03 Give feedback that lands

Copilot Chat

THE PROMPT

Help me plan feedback for a team member. What I saw: [specific behaviour, when and where]. The impact it had: [on the work, the team or customers]. What I'd like instead: [the change]. Write it using the situation, behaviour, impact approach, in under 120 words, then give me two questions I can ask to hear their side.

**Tee's check** Stick to what you saw, not what you assume about why. Give it privately and soon. If this is a pattern rather than a one off, keep a short dated note of the conversation.

### 04 Say thank you properly

Copilot in Teams or Outlook

THE PROMPT

Write a short, specific thank you message to [role] for [what they did]. Mention the difference it made to [the team, a customer or the project]. Warm and genuine, no more than 80 words, no exclamation marks, and nothing that sounds like a template.

**Tee's check** Make sure it sounds like you. Specific beats grand: name the exact thing they did. Consider whether public or private praise suits this person better.

## Absence and wellbeing

### 05 Plan a return to work conversation

Copilot Chat

THE PROMPT

I'm a UK line manager. A team member is returning after [number] days off sick. Help me plan a supportive return to work conversation: how to open it, questions to check they're ready, how to ask if anything at work contributed or would help, and how to explain our absence process calmly if a trigger point has been reached. Our absence policy says: [key points, or reference your policy file].

**Tee's check** Don't paste the person's diagnosis or medical details. Keep it a welcome back, not an interrogation. Note what was agreed. If the absence may relate to a disability, think about reasonable adjustments before any warnings.

### 06 Agree a phased return

Copilot in Word

THE PROMPT

Draft a simple four week phased return plan for someone returning to a [role] role after a long absence. Their fit note says they may be fit for work with: [the changes it suggests, such as altered hours or duties]. Show hours and duties week by week, review points, and who they can talk to if it gets hard. Plain English, one page.

**Tee's check** Agree the plan with the person, and with occupational health if you use them. Check how pay works during a phased return under your policy and make that clear. Review it, don't just set it.

### 07 Talk about reasonable adjustments

Copilot Chat

THE PROMPT

A team member has told me they're [neurodivergent / managing a long term health condition] and asked for support. Without making assumptions about their condition, help me plan a conversation that asks what helps them work best, and give me a list of common low cost adjustments for a [role] role, such as changes to communication, workspace, hours or priorities. Include how Access to Work might help.

> **Tee's check** Let the person lead. Their experience matters more than any list. Many adjustments cost nothing. Record what you agree, try it, and review it. The duty to make reasonable adjustments is a legal one, so take it seriously.

## Performance and conduct

### 08 Hold an early performance conversation

Copilot Chat

THE PROMPT

I'm a UK line manager with an informal concern about a team member's performance: [specific examples with dates, and the standard expected]. Help me plan a fair, supportive informal conversation: how to open it, how to describe the gap with examples, questions to understand any reasons behind it, what support I could offer, and how to agree a review date. No threats and no formal language at this stage.

> **Tee's check** Informal first, unless it's serious. Ask about the reasons before you plan the fix: health, caring, workload or training can all be behind it. Confirm what you agreed in a short follow up. From 1 January 2027, unfair dismissal protection starts after six months, so early, fair conversations matter even more.

## 09 Prepare investigation questions

Copilot Chat

THE PROMPT

I've been asked to carry out a workplace investigation into an allegation that [neutral one line summary, no names]. Help me prepare neutral, open, non leading questions for the meeting with the person concerned and for any witnesses, plus a simple structure for the meeting: introduction, explaining the process and confidentiality, questions, and close. Remind me of good practice under the Acas Code of Practice.

**Tee's check** Investigate, don't decide. Keep an open mind and the questions neutral. Check whether your policy allows the person to be accompanied at this stage. Take notes and share them. Speak to HR before you start.

## 10 Turn your notes into a fair summary

Copilot in Word or Teams

THE PROMPT

Turn these rough meeting notes into a clear, factual summary in plain English: [paste notes, using roles not names]. Use headings for what was discussed, what was agreed, actions and owners, and the next review date. Keep it neutral: no opinions or assumptions that aren't in my notes.

**Tee's check** Check it against what was actually said, word for word where it matters. Remove anything Copilot added that you didn't say. Share it with the person and invite corrections. If you used Teams recap, check your organisation's rules on recording and transcription.

# Requests and change

## 11 Handle a flexible working request

Copilot Chat

THE PROMPT

I've received a flexible working request from a [role]: [what they've asked for and from when]. Help me think it through fairly under UK law. List the questions I should consider about how it could work, ideas for a trial period or a compromise, and the eight statutory business reasons an employer can rely on if a request is refused. Then draft a short, warm reply inviting them to a meeting to discuss it.

**Tee's check** Employees can ask from day one, and you must decide within two months, including any appeal, unless you both agree longer. Consider it genuinely: a trial is often the answer. If you refuse, explain which business reason applies and why. Never refuse because it might set a precedent.

### 12 Run a probation review

Copilot in Word

THE PROMPT

Help me prepare a probation review for a [role] who started on [date]. What's gone well: [notes]. Concerns, with examples: [notes]. Support given so far: [notes]. Give me a structure for the meeting, a balanced written summary, and wording for [passing probation / extending it with clear targets and a new date / a concern that needs HR advice].

**Tee's check** Probation isn't a free pass. Discrimination law applies from day one, and from 1 January 2027 employees can claim unfair dismissal after six months. Set clear targets and review dates, record the support you gave, and get HR advice before any decision to end employment.

### 13 Prepare for a difficult conversation

Copilot Chat

THE PROMPT

I need to have a difficult conversation with a team member about [topic, such as a change to their role, hours or team]. Help me plan it: a clear opening line that gets to the point kindly, the key message in two sentences, how to respond to likely reactions such as upset, anger or silence, and how to close with next steps and support. UK workplace, plain English.

**Tee's check** Practise saying it out loud. Pick a private place and enough time. Changes to someone's contract usually need their agreement, so check with HR before you present anything as decided.

## Grievances and conflict

### 14 Acknowledge a grievance

Copilot in Outlook

THE PROMPT

A team member has raised a written grievance about [neutral one line summary]. Draft a short, professional acknowledgement that thanks them for raising it, confirms we're taking it seriously, explains the next step under our grievance procedure, invites them to a meeting, and reminds them of their right to be accompanied by a work colleague or trade union representative. Warm, neutral and no more than 150 words.

**Tee's check** Acknowledge it quickly. Don't comment on the merits yet. Follow your grievance policy and the Acas Code, as failing to can affect any later tribunal award. If the grievance is about you, someone else should handle it, so tell HR.

## 15 Help two people work together again

Copilot Chat

THE PROMPT

Two people in my team have fallen out and it's affecting the team. Without taking sides, help me plan: a private conversation with each person (open questions to understand their view), then a joint conversation focused on how they'll work together from now on. Give me ground rules for the joint meeting and a simple way to agree and record working arrangements.

**Tee's check** Listen to both separately before bringing them together. Focus on behaviour and the work, not on who was right. If there are allegations of bullying, harassment or discrimination, this isn't a mediation, so speak to HR.


## Copilot can draft it. You still have to say it.

Copilot can draft in seconds. Knowing what fair looks like, what the law expects and how to say it so people listen is what makes a good manager. That's what Manager Capability Training covers: 12 online modules, CPD Accredited by CPD Professionals, £99 per person.

**teeobi.com/shop-manager-capability-training.html**


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